



ESTONIA MEDIA LANDSCAPE

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Country Overview

A DIGITALLY DRIVEN SOCIETY

Overview of Estonia



CAPITAL
Tallinn

REGION
Europe

GDP PER CAPITA, PPP
\$38,294

GDP
\$31.0 billion

POPULATION
1,326,898

AREA
45,228 SQ.KM

The country's territory includes a mainland and more than 2,000 islands.

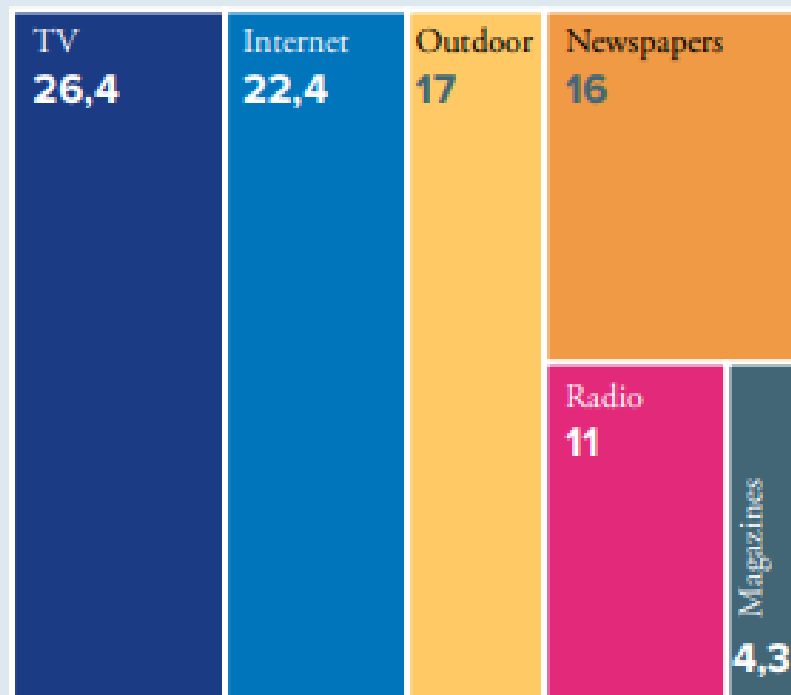
Estonia today is a parliamentary representative democracy. Its foreign relations look decidedly to the West; the country has been a member of NATO and the European Union since 2004, and in 2011 it became a eurozone member state.

Roughly two-thirds of the country's population is ethnic Estonian, with Russians comprising the largest minority.

Media Consumption Overview

TV IS THE PREVALENT TRADITIONAL MEDIUM

Advertising market value by media type in Estonia in 2019 (million euros)



Source: Kantar Emor



Almost spend 4 hours watching TV



One of the most trusted mediums



Print has declines over the years but still reaches millions

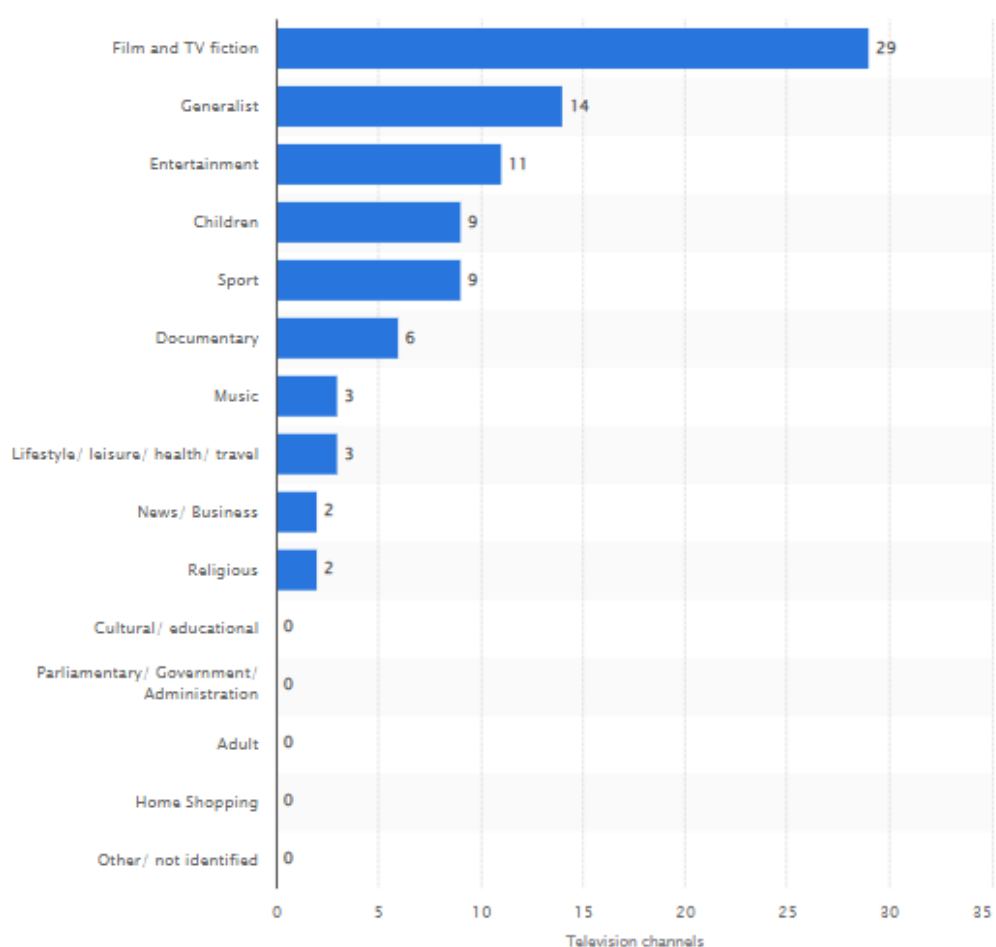


Internet penetration is 92%

TV Consumption

TV IS THE MOST CONSUMED TRADITIONAL MEDIA

No. of TV channels in Estonia, by genre 2019



- Despite the wide reach of digital media in Estonia, traditional TV and radio programs are still popular.
- Covid-19 emergency situation boosted the viewing numbers of news broadcasts.
- Time spent watching TV on an average daily is 4 hours 59 minutes.

TV Consumption

TOP TV CHANNELS



ETV
Market Share: 15.9%

Eesti Televisioon is an Estonian free-to-air television channel owned and operated by Estonian Public Broadcasting. ETV programming is varied offering interesting programs for all age and interest groups. The programs include educational, science, culture, lifestyle, current affairs, entertainment and children's programs and strong sports programs.



Kanal 2
Market Share: 9%

Kanal 2 is a privately owned Estonian television channel. The uniqueness and success of Kanal 2 lies in consistent efforts to improve domestic programming the relative importance and quality of which has been taken to a high level over the years. Concentrating on domestic programming has given Kanal 2 a loyal audience reflected in consistently high ratings.



TV3
Market Share: 8.7%

TV3 is a commercial television channel targeted at an Estonian language audience owned by Providence Equity Partners. It is a General Entertainment and News channel.

Radio Consumption

CONSIDERED A TRUSTED NEWS SOURCE

Top Radio Channels



Sky Plus (FM 95.4)



Vikerraadio (FM 104.1)



Raadio 2 (FM 101.6)



Power Hit Radio (FM 102.1)



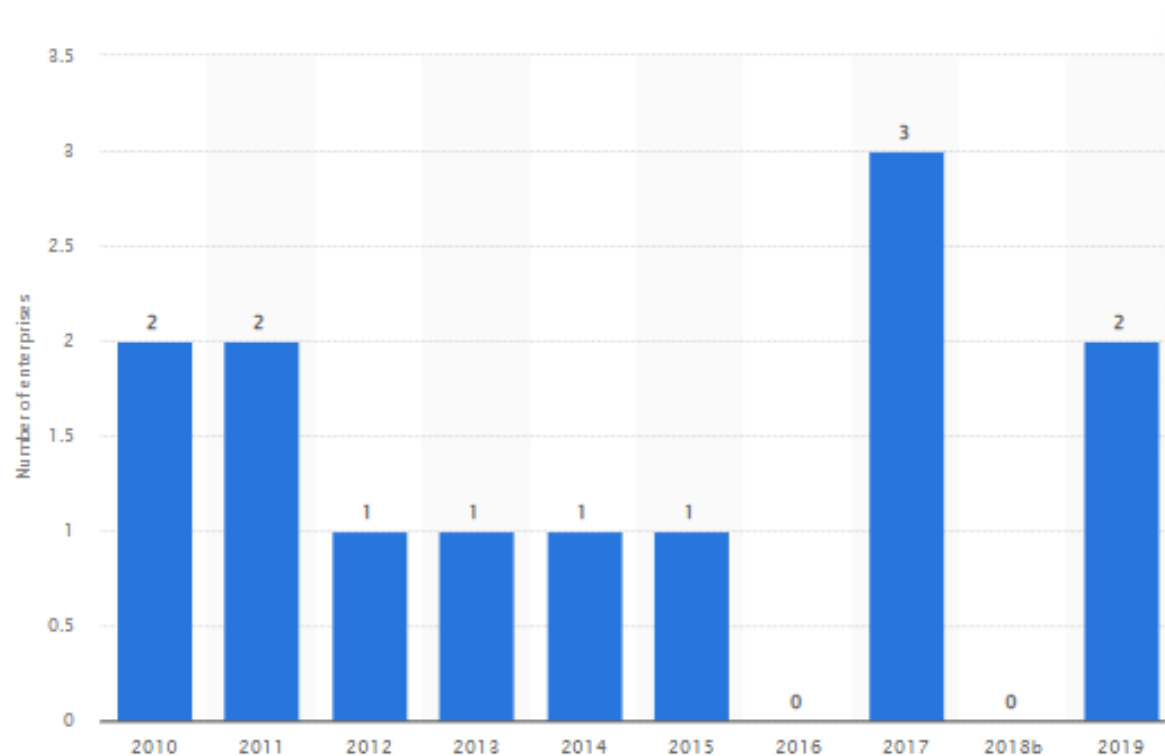
Raio Kuku (FM 100.7)

- In Estonia there are around 35 private radio stations with programs broadcast both in Estonian and in Russian and radio is the primary source of information for 51% of Estonians.

Print Consumption

NEWSPAPERS ARE CONSIDERED A RELIABLE SOURCE OF INFORMATION

Number of new enterprises in the printing of newspapers industry in Estonia from 2010 to 2019



- Estonia has three main daily Estonian-language newspapers: Postimees, Eesti Päevaleht and Õhtuleht. There are also two major weeklies, Eesti Ekspress and Maaleht that add up to over fifteen local newspapers.
- There has been surge in the consumption of online news portals compared to print.
- All major newspapers have gone online in recent years, and several online-only news portals have extensive readership.

Print Consumption

TOP PRINT TITLES



Postimees Circulation: 55,000

Postimees is an Estonian daily newspaper established on 5 June 1857, by Johann Voldemar Jannsen. Postimees is currently published six days a week and has the largest circulation and readership in Estonia with 55,000 copies sold during the workweek and over 72,000 on weekends.



Maaleht Circulation: 40,800

Maaleht is the biggest weekly newspaper published in Estonia. Maaleht has a preference for positive human interest stories - feature stories and portraits are popular.



Õhtuleht Circulation: 42,100

Õhtuleht (Evening Paper) is one of the largest daily newspaper in Estonia. It is a tabloid newspaper. The newspaper is published in Tallinn in the Estonian language.



Eesti Ekspress Circulation: 24,800

Eesti Ekspress was founded in 1989, the country's first independent newspaper after the Iron Curtain came down. The paper sees itself as a flagship of investigative journalism.

Digital Consumption

THE NUMBER OF INTERNET USERS IN ESTONIA INCREASED BY 2% BETWEEN 2021 AND 2022



Digital Consumption

TOP GOOGLE SEARCHES

FEB
2022

TOP GOOGLE SEARCHES

QUERIES WITH THE GREATEST VOLUME OF GOOGLE SEARCH ACTIVITY BETWEEN 01 JANUARY 2021 AND 31 DECEMBER 2021



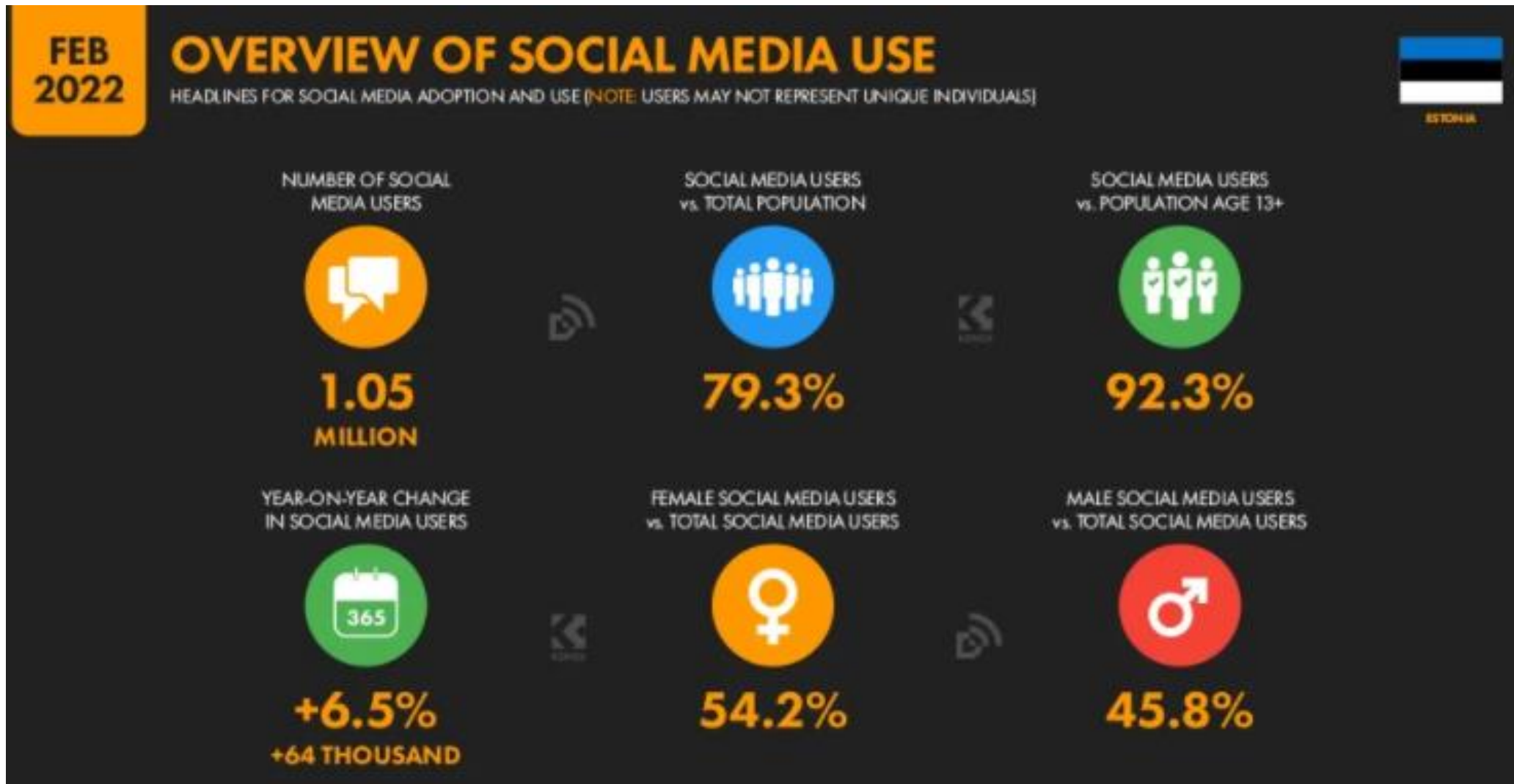
ESTONIA

#	SEARCH QUERY	INDEX
01	DELFI	100
02	TRANSLATE	82
03	GOOGLE	70
04	POSTIMEES	66
05	FACEBOOK	57
06	YOUTUBE	48
07	GOOGLE TRANSLATE	35
08	ONLINE	26
09	ILM	25
10	ÕHTULEHT	25

#	SEARCH QUERY	INDEX
11	ПОГОДА	21
12	ERR	19
13	SEB	17
14	MAPS	16
15	MAIL	16
16	ПЕРЕВОДЧИК	16
17	SWEDBANK	14
18	EESTI LOTO	13
19	TÕLGE	11
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Digital Consumption

THE NUMBER OF SOCIAL MEDIA USERS IN ESTONIA INCREASED BY 6.5% BETWEEN 2021 AND 2022



Let's Discuss

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